

Option Filters Overview

Time: 00:09:17

Option Filters bring tabular data into your configurator. This course introduces some basic design principles to help determine when and how to use them. We will demonstrate creating an options filter to make a long list of options easier to use. You'll see how reordering fields connected to an option filter changes the user's path through that data, and how the option filter can disable or even hide fields from view.

Objectives

- Option Filter Design
- Segmenting a Long List of Options
- Reordering Fields
- Disabling and Hiding Fields

Option Filters Design

Time: 00:43:00

When your customer is buying your custom product, they need to see the product's parameters, like color or size or material. For each parameter, they also need to see the available options so they can select the best one to meet their needs. Picking from a list is the easiest way to make a decision. Therefore, most of your configurator fields will use one of the select controls: a simple select, an image select, or a radio button. These controls give the user a list of options and identify the option they want. But designing a configurator requires some planning. Consider Scalability. Your company will have more than one configured product. So, you'll maintain more than one configurator. What if some options are shared across many configurators? How can you be sure the list of options is always up to date everywhere? Consider Maintainability. For many products, if the customer selects an option for one parameter, the available choices for another parameter may change. If the complex relationships between fields aren't easy for you to maintain, you might create a logic error. That mistake can stop people from buying the product they want. Or show an impossible combination that can't be manufactured. Consider Usability. What if the list of possible choices is long? It's been scientifically proven that when confronted with too many choices, people often make no decision at all, and walk away. Scalability, maintainability, and usability problems like these can be solved with Option Filters. Option filters are like bridges that connect your configurator with tables of data and have some great benefits. Since your configurator and the data that drives it are separate, you can use one table to drive the choices in many configurators. Update your table once, and that change goes everywhere. Since information in a table format is easy to understand, you can use tables to describe business logic in a way all your colleagues can understand, from product engineering to marketing to legal. And since tables are easy to change, you can add columns to break up a long list of options into smaller, easier-to-understand groups. With a little planning and data modeling at the start, you may find a complex configurator project can become much simpler with Option Filters.

Segmenting a Long List of Options

Time: 04:14:19

To build an option filter, be sure you have both a configurator and a table of data that will appear as configuration choices. Start by selecting the option filter node in the configurator's design tree. You'll see a plus

sign appear. Click the plus sign to create an option filter. Select the new option filter on the left and begin setting its parameters on the right. First, give it a name. Note that an option filter can be based on many sources of tabular data. We'll be using a Table. We want rows from this table to appear as options in our material field so drill down in the UI node of the configurator to find that field. Since the field has a select control, there's a section for the select options. Open the select options and notice that the source of options is a simple table. The table allows us to specify the value, label, description, and image for every option. Change the source to option filter. Select which option filter should be used. Here, we only have one, so the list of choices shows one entry. Notice the same four parameters must be specified as before: value, label, description, and image. Choose which column from the option filter should be used for each of those parameters. As before, only the value is required. If you don't have data in your table to serve as a label, description, or image, you can leave those blank. Save and run your configurator. You'll see that the material field now shows choices from the table. You've now connected the table of data to your configurator through an option filter. Did you notice that this list is a long one, and difficult to use? Let's make it easier for our customer to make a selection by segmenting or breaking up the list of options. Notice that our source table lists not only the material, but also the type of material. Let's use that column to create a drill-down user interface. Return to the configurator designer. Duplicate the Material field, and make three changes to the new field: First, change the name and label to Material Type. Second, scroll down to the Value column. It should also be changed to Material Type. Third, drag this new Material Type field above the Material field. We want to use the material type field to filter the choices in material field, so it must be above that field in the explorer. Run your configurator again. You'll see the new Material Type field listed above the Material field. The material type field shows the unique values from the materialType column in the table. Duplicates are automatically removed. Also, it's filtering the choices in the subsequent material field. Since both fields are connected to the same option filter, any selections made in one field filters the choices in the fields below it. Let's add a third field to use that third column of data from the table. Return to the configurator designer and copy the Material field. Change the name and label to Material Subtype. Now, scroll down to the Value column and change it as well to Material Subtype. Finally, drag the new Material Subtype field between the Material Type field and the Material field. We want to create a drill-down effect across the 3 fields. Run your configurator a final time. You'll see the Material Type field filters the Material Subtype field, which filters the Material field. There's no limit to the number of fields you connect to one option filter. A configurator can have as many option filters as you need.

Reordering Fields

Time: 09:09:26

When more than one field is connected to the same option filter, the order of the fields in the user interface is important. Most users work their way through a configurator from top to bottom, like reading a web page. Therefore, your configurator should usually ask the most important questions first. These are the questions that change the options available in other questions. Relationships between fields like this are called dependencies, and an important part of configurator design is mapping these dependencies. In our example, we asked the customer about the Material Type first, because we want it to filter the subsequent fields. If we change the order of the fields, we change the customer's experience. Let's drag Material above the other two fields, and run the configurator. Now, nothing is filtering the Material field, since it's the first field displayed using this option filter. The Material Type and Material Subtype fields are no longer filters guiding the customer's progress. There's no right or wrong way to order the fields connected to an option filter. In summary, if you want to use a field to limit the choices in another field driven by the same option filter, drag it above that field. If you want to use a field for

informative purposes, to give more information about what was already selected through an option filter, drag it below that field.

Disabling and Hiding Fields

Time: 11:32:06

Depending on the structure of the tabular data you're using, and what your user has selected, some fields connected to an option filter may have only one option. You can control how those fields appear to the user. We will edit the configurator and select the option filter in the explorer pane. In the option filter properties, specify what should happen When a field has only one option. By default, the option filter does nothing but there are other choices. First, the option filter can disable the field. The field is still visible, but it's clearly not editable. Second, the option filter can also hide the field. Logically the field is still there, but your customer cannot see it. Any components below the hidden field move up and there is no visual gap.

Recap

Time 12:36:21

In this course, you learned how option filters organize tabular data in your configurator. You saw various kinds of problems option filters can solve. We built an option filter to a local table that made a long list easier for the customer to use. You learned how the order of fields connected to an option filter changes the user's path through that data, and how the fields themselves can be disabled or even hidden from view if they have only one choice.

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